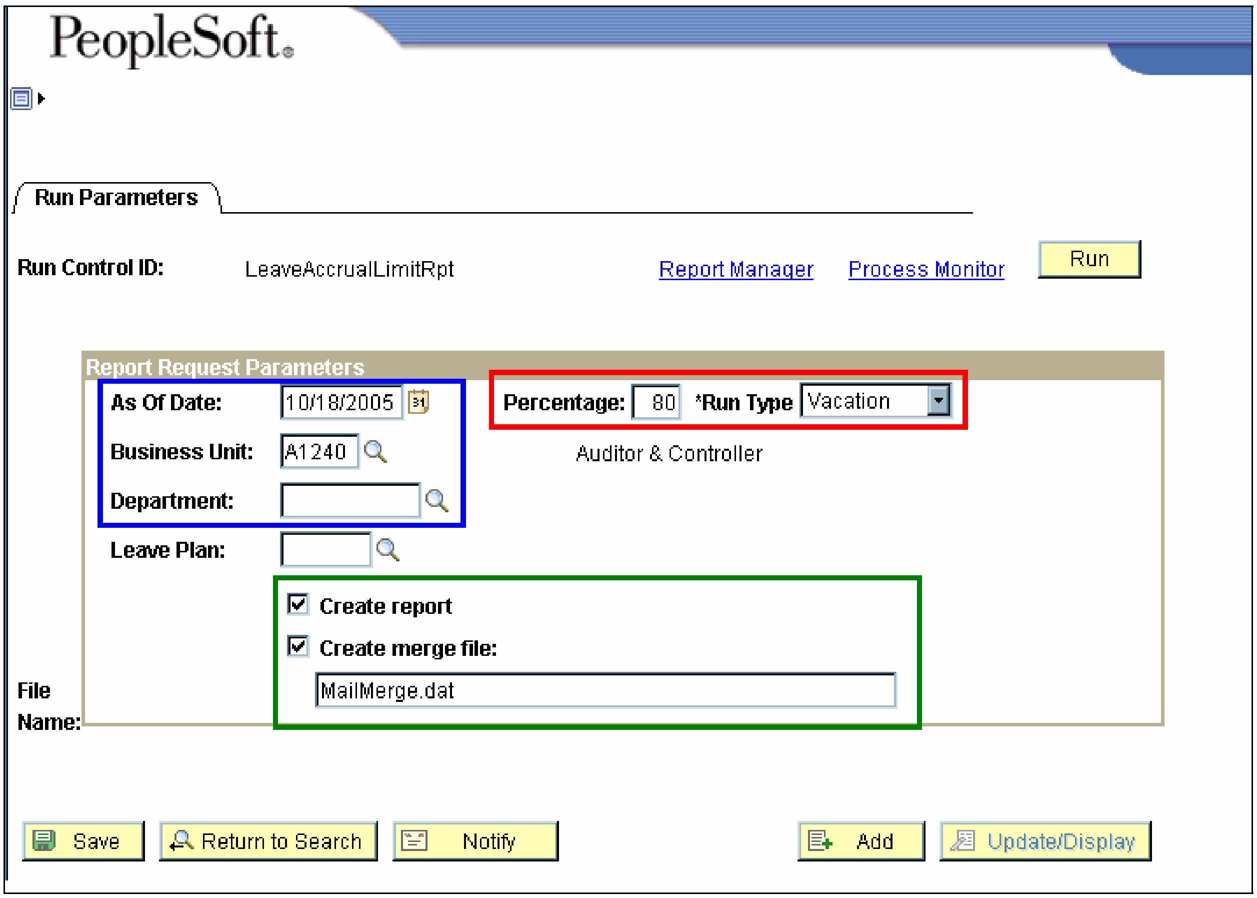
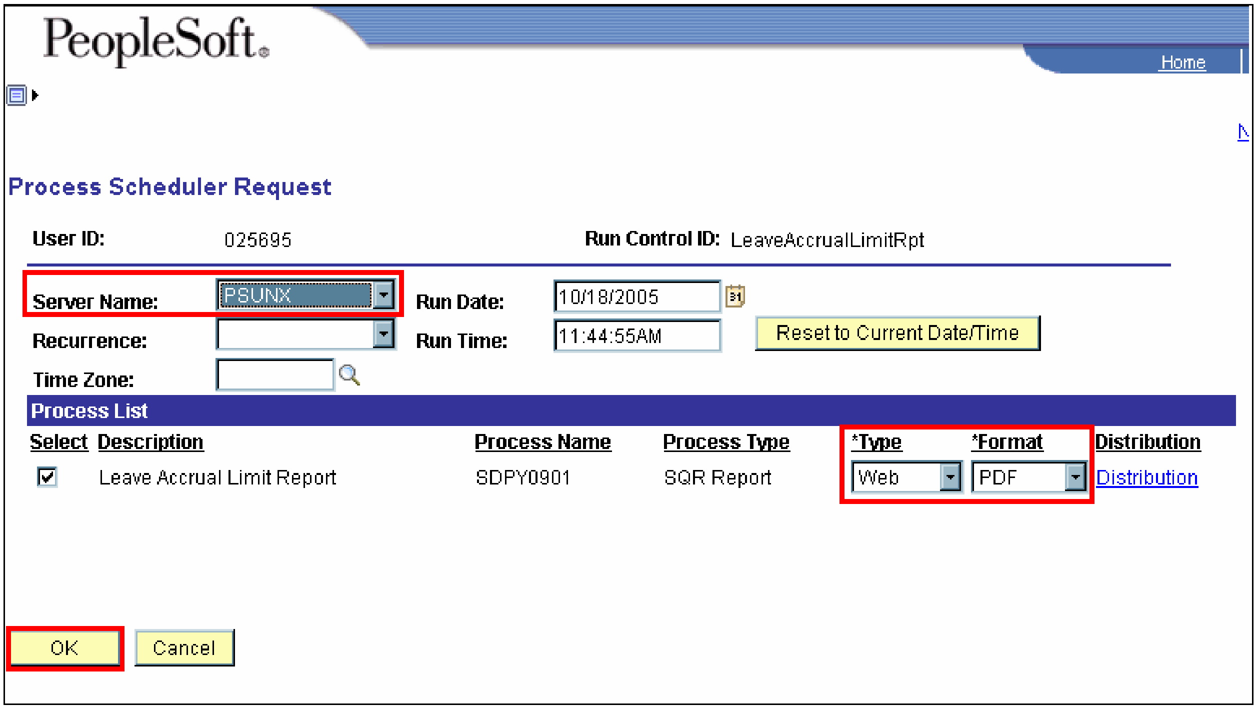
1. Make sure your Parameters include "Percentage: 80" and "*Run Type: Vacation"
2. Change the "As of Date" and "Business Unit" per your request. If you want to narrow down your search by Department, you may also enter a value in the "Department" field.
3. Checkbox "Create report" and "Create merge file:". Name your file accordingly and be sure to follow the file name with ".dat".
   a. For example: <<MailMerge.dat>>

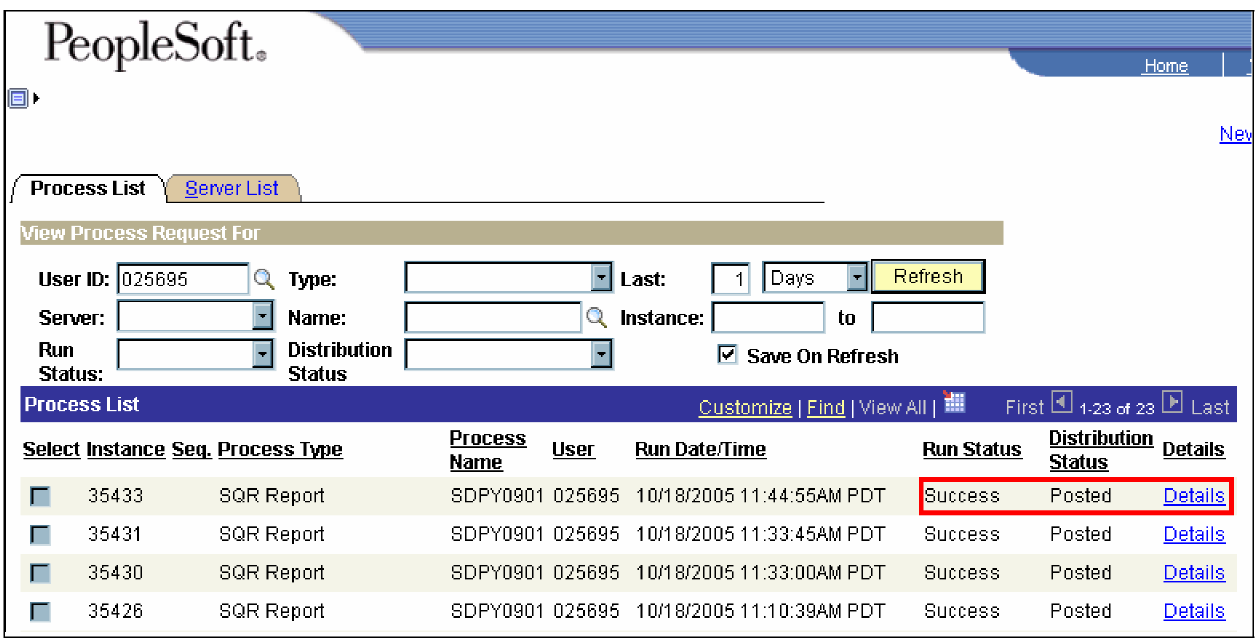


4. Click the "Run" tab. This will lead you to the Process Server Request page.

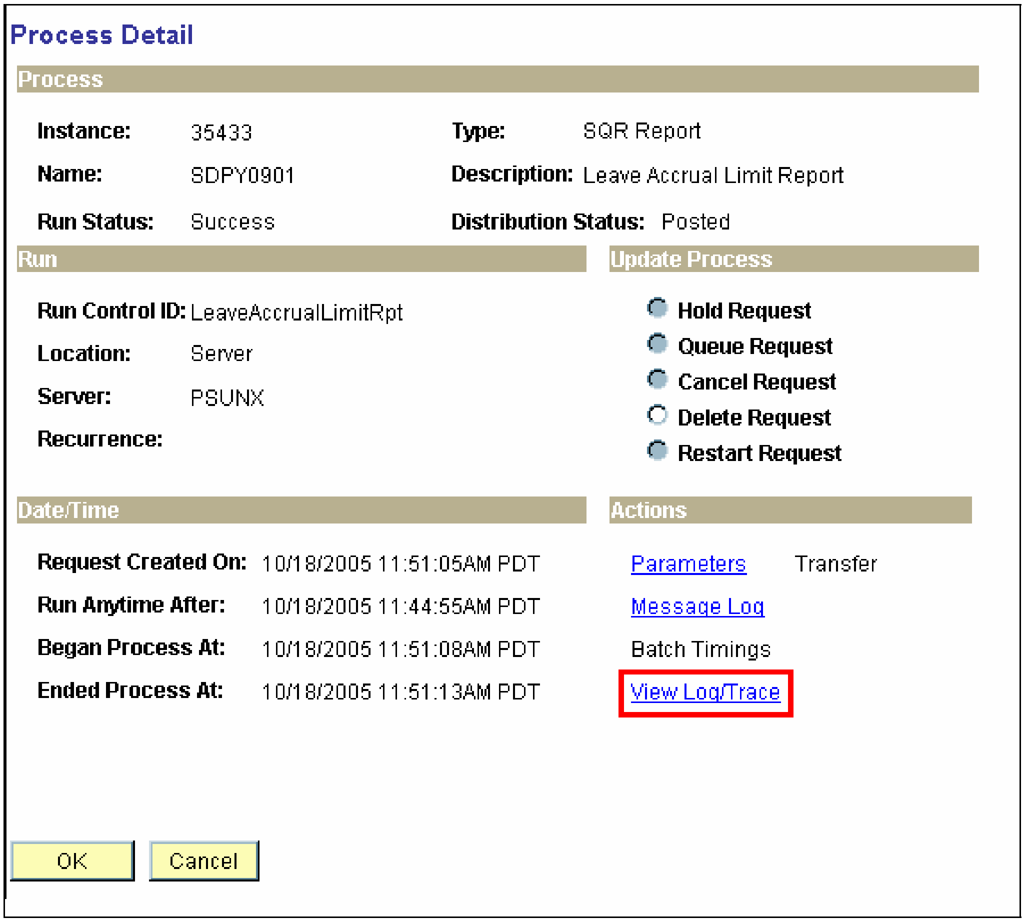
5. Make sure this page includes the following: "Server Name: PSUNX"; "*Type: Web" and "*Format: PDF", then click "Ok". You will return to the Run Parameters page.



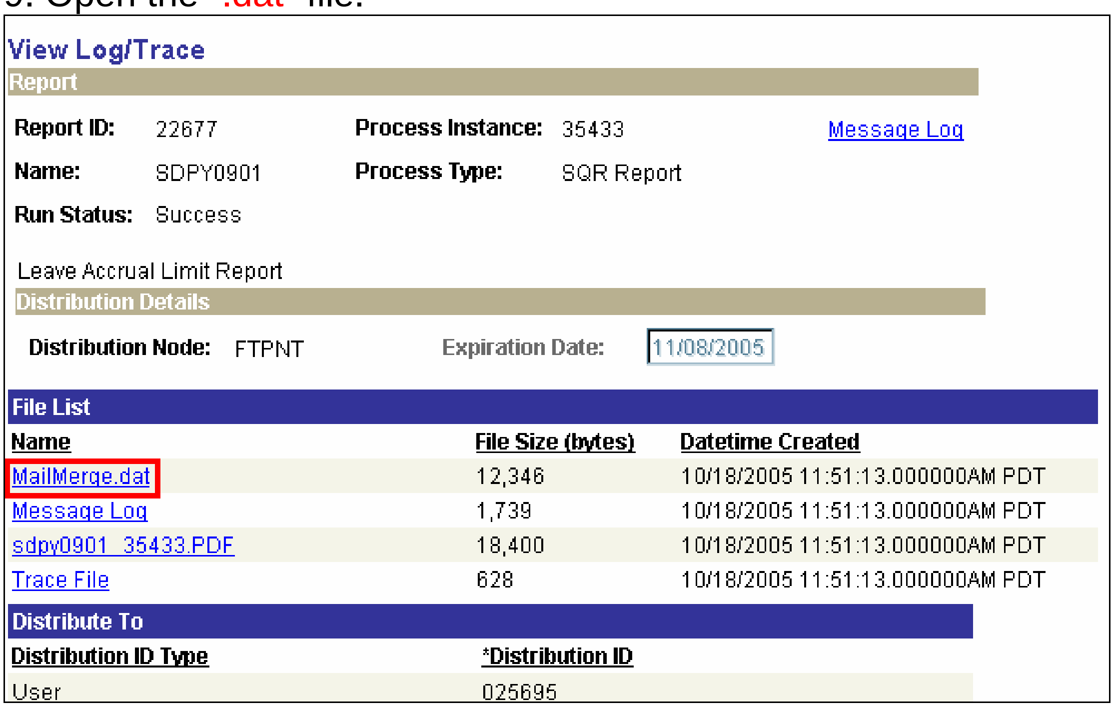
6. Click “Process Monitor”. This will lead you to the Process List.
7. When the report status is Successful and Posted, click the “Details” link.



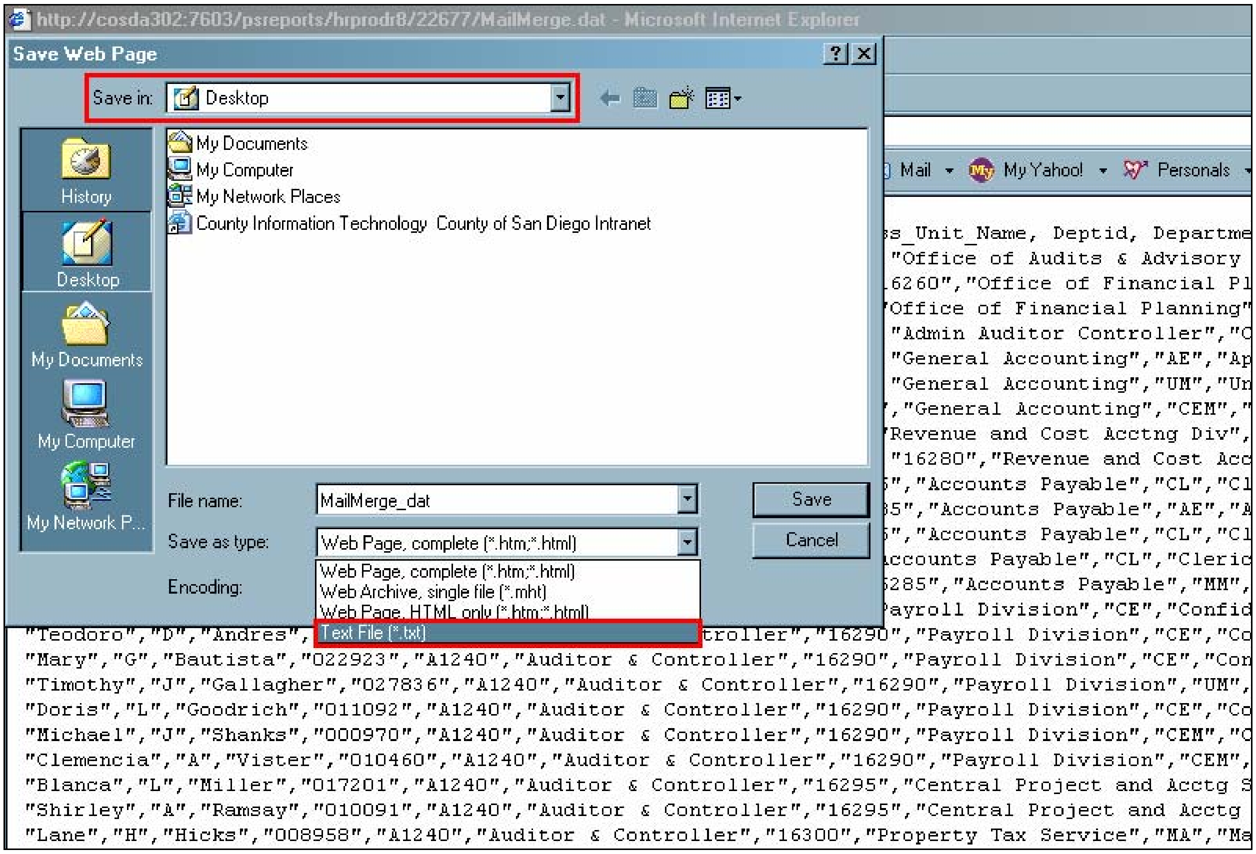
8. Click the “View Log/Trace” link.



9. Open the ".dat" file.

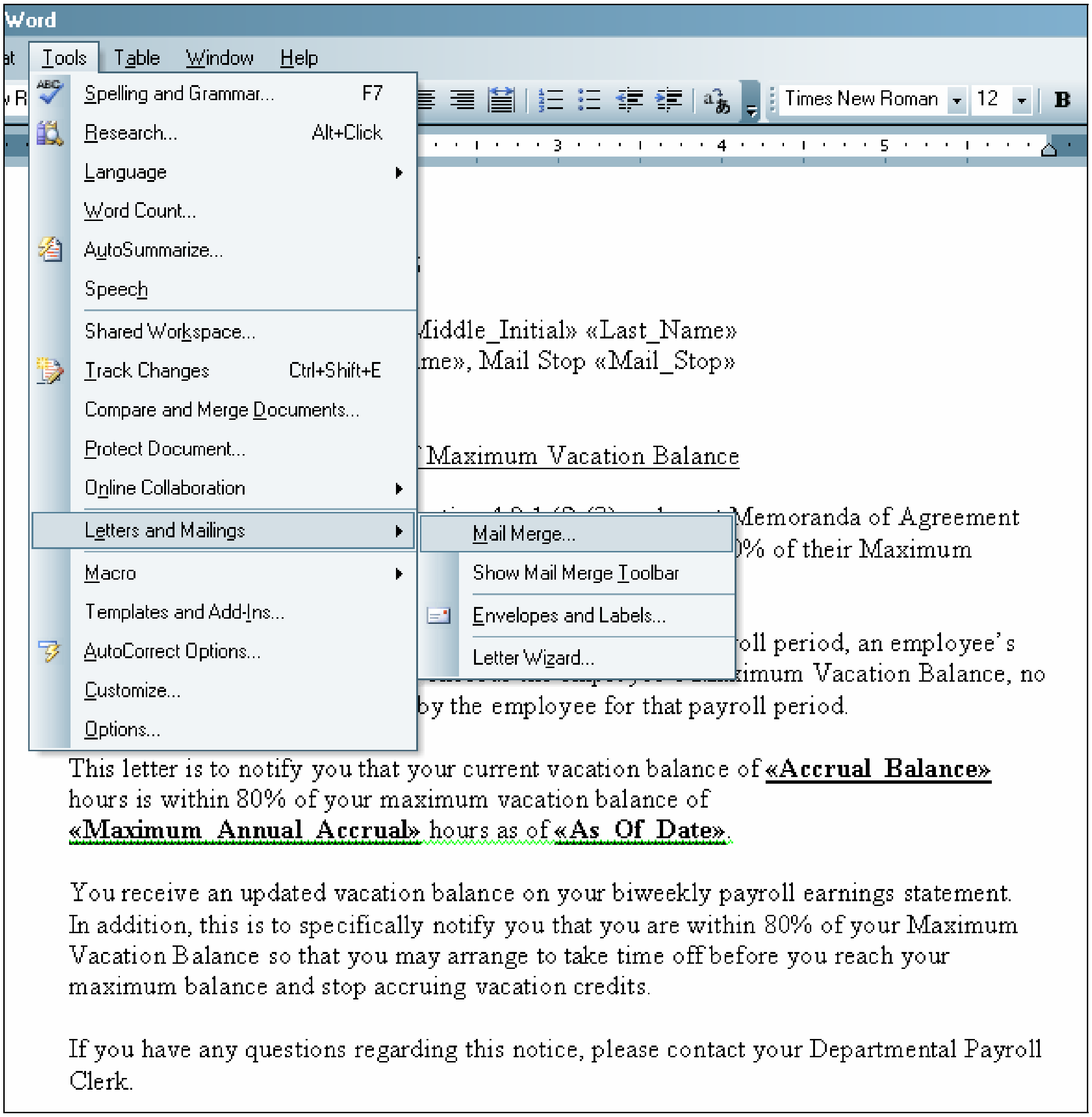


10. Save this file on your desktop (or any accessible folder), making sure to save it as a “text file (*.txt)”.

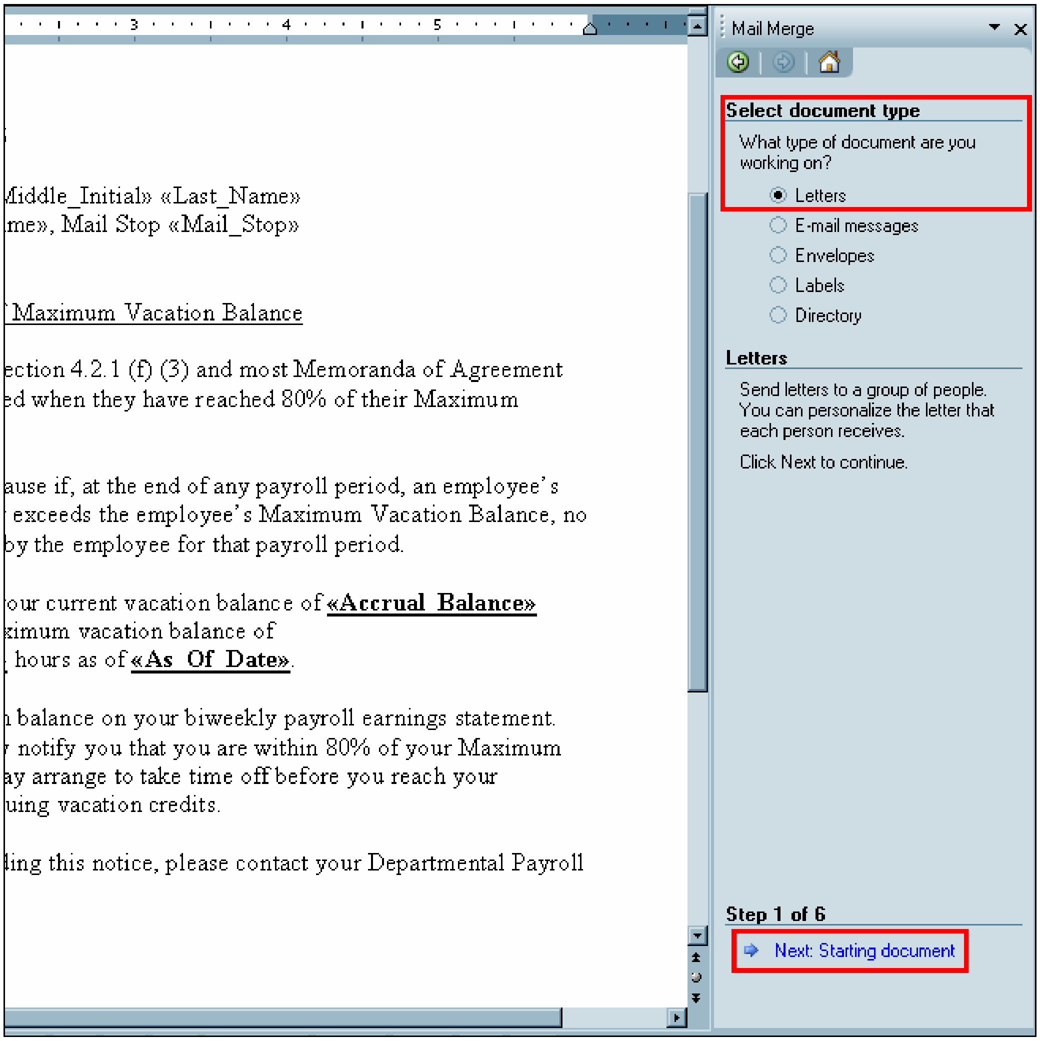


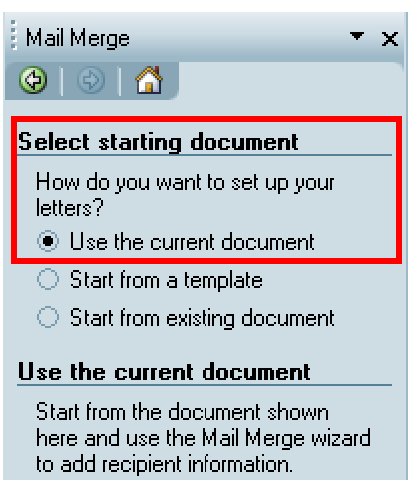
11. Now, open the generic Maximum Vacation Balance letter template <<file name: MaxVacLetter.doc>> in MSWord.

12. Click on “Tools”, then “Letters and Mailings”, then “Mail Merge”



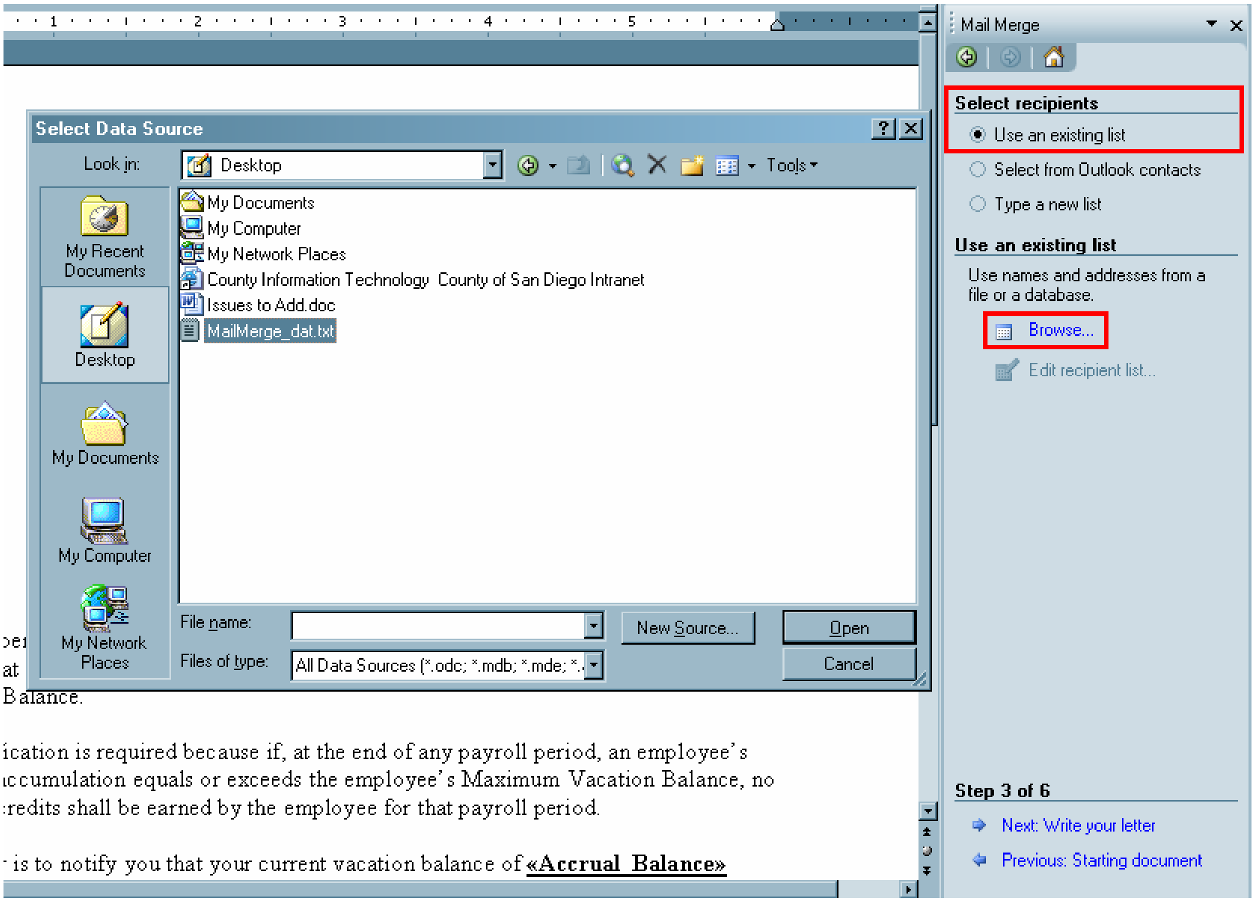
Step 1: A menu on the right-hand side will open. Select "Letters" under "Select document type". Then click "Next" at the bottom of the page.





Step 2: Under "Select starting document," select "Use the current document" and click "Next" at the bottom of the page.

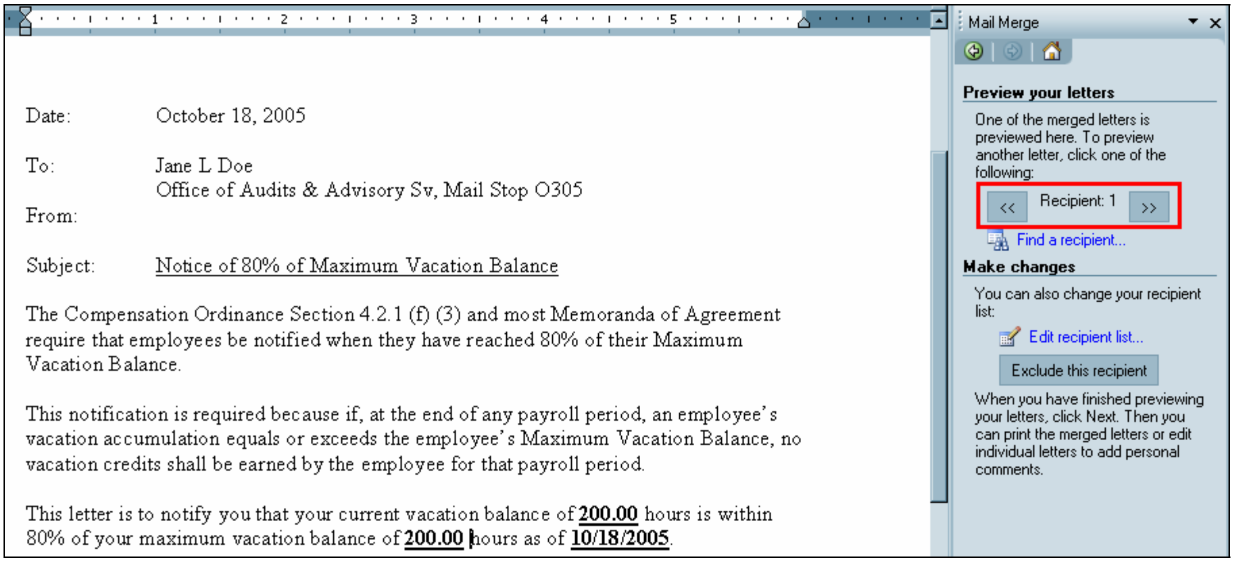
Step 3: Under “Select recipients” select “Use an existing list”, then click “Browse”. Find the .dat file, saved as a text, from before. The file in this sample was saved as <<MailMerge_dat.txt>>.

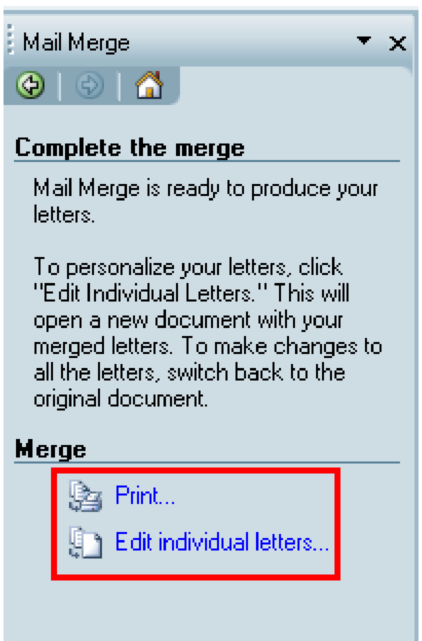


A new tab, titled “Mail Merge Recipients”, will open with the employees’ data. Verify that this is the correct data. If so, click “Ok”. If not, edit the list or select a different file. Then, click “Next”.

Step 4: The right-hand menu will now read “Write your letter”. Within this menu you may insert more fields into the letter. Click “Next”.

Step 5: Now, the Maximum Vacation Balance letter template should be filled with the necessary data from the .txt file. Each employee will be listed separately on different pages. It is possible to preview each individual letter by clicking the arrows under “Preview your letters” in the menu bar. Click “Next”.





Step 6: The right-hand menu will now read "Complete the merge". Within this menu you may Print or Edit (personalize) the letters.